U.S. TOTAL ARMY PERSONNEL®





**OER Guide** 

# Purpo Se

To update the leadership on the Army's Officer Evaluation Reporting System.



# Evaluation Systems (Facts)

- Mission of the OER is to identify your best
- OER is an assessment tool
  - OER is a forced distribution system (All services have one)
  - Top Box restricted to 49% (Our system is the most liberal)
- Promotion system is based on Army requirements
  - Use the top box to identify your best officers
  - Can't predict selection board results on ACOM or COM labels (Whole File Concept)
  - Based on a series of reports

(Whole File Concept)

- Commander is overall care-taker of all personnel systems
- Counseling is key.



# Intent of 67-9 OER

- Provide selection boards adequate information to make their decisions.
- Reestablish field impact on selection of future leaders.
  - Opportunity to advance the "Best"
  - Confidence that others cannot inflate
- Improve Counseling.
  - Support Form (Pass Form Two Levels Down)
  - Junior Officer Developmental Support Form
    - Mandatory for LTs & WO1

# **Bottom Line Up Front**

- System is Working
- No Change
- COM Report is not a Killer (COM report vs COM File)
- You Need to Understand "How the System Works"
- Counseling is the Key

# Sessions Conducted by G-1 (Jul 01 thru Mar 02)

#### **Conclusions:**

- Current OER accomplishes what it was designed to doassess performance and potential of officers. It also provides an effective tool which enables the Army to identify, assign and select the best qualified officers for promotion, education, and command.
- OER is settling anxiety and uncertainty is diminishing as the system matures.
- Officers Corps prefers the current OER over other options and possible alternatives.

# of 67-9 OER Conducted by G-1 (Jul 01 thru Mar

# Chief of Staff, Army approved the following six recommendations:

- No change to the Senior Rater portion; keep current percentage constraints in place. No more than 49% ACOM.
- Revise rater's portion of the OER to separate the performance and potential portions to correct a source of confusion in the narrative.
- Mask all LT OERs upon promotion to CPT.
- Emphasize (by all leaders) counseling and mentoring.
- Review masking CW2 OERs on selection to CW3.
- Conduct annual assessment of the system.

# **OER System Update**

- Board feedback continues to be extremely positive
- Three field issues remain:
  - Counseling
  - Concern over fear of Center of Mass; Dissipating based on:
    - Board Results
    - Field feedback from ARI, PERSCOM, IG
  - Senior raters need to develop a "Rating Philosophy" and consider communicating it to rated officers.

# OER Trends 67-9

	ACOM	СОМ	BCOM-R	BCOM-DNR	Not Eval	Total	% ACOM
BG	317	420	0	0	26	763	43.0%
COL	6181	10012	22	16	308	16539	38.1%
LTC	16427	24902	79	33	582	42023	39.6%
MAJ	25172	39102	137	82	591	65084	39.0%
CPT	39641	66561	387	342	895	107826	37.1%
1LT	21408	36949	315	256	184	59112	36.3%
2LT	4008	13147	161	132	5	17453	23.0%
CW4	2472	4805	8	2	101	7388	33.9%
CW3	5640	10309	27	17	154	16147	35.3%
CW2	9878	17023	96	89	162	27248	36.5%
WO1	1074	3179	9	22	0	4284	25.1%
TOTAL	132218	226409	1241	991	3008	363867	36.6%

"Vast Majority of OERs arriving at DA are Center of Mass"

# **Board Feedback**

- Selection boards strongly endorse New OER.
  - Overwhelming majority (1650 Board members) believe OER provides necessary information to select future leaders.
- Boards can distinguish between a COM report and a COM File.
  - Over 18,000 Officers selected by all boards with COM OERs.

# General Observations: What's Important to Board Members?

Senior Rater Narrative

Senior Rater Label

Duty Description

# **Board Feedback**

- Center of Mass File is different from a Center of Mass Report (many ACOM officers have COM reports). However, having all COM reports places an officer at risk.
- Most officers have received at least one COM (Over 92% of all CPTs; 88% of all MAJs; 86% of all LTCs, 80% of all COLs). These figures continue to rise.
- A COM OER, by itself, is not a killer; all boards select officers with at least one COM report; over 18,000 selected so far (many of those had multiple COMs).
- Most of those who are successful will have a mix of ACOM and COM OERs, but some ACOMs in key jobs (BQ) are a must. Spikes in file are essential.
- Receiving <u>all</u> COM OERs will place you at risk beyond promotion to Major (COM file vs COM report).
- Board results indicate officers with a mix of ACOMs and COMs are competitive to LTC.
- Enthusiastic, but not overexaggerated, narrative often differentiates among COM reports.

## LTC, Army Board

### First Board under OPMS 3

## Recessed 22 CMarch 02

#### **Operations**

(Avg. 3.9 per file) (Selected 836 w/ 67-9) 67-9)

- 74% Selects had at least one 67-9 COM
- BO Position 42% Selects had at least one
- 49% Selects had two or more 67-9 COM
  - 117 Selects had 3 COM
  - 68 Selects had 4 COM
  - 11 Selects had 5 or more COM

#### **Institutional Support**

w/67-9) (Avg. 4.2 per file) (Selected 117

 $\frac{-80\%}{\text{COM}}$  Selects had at least one 67-9

 $\stackrel{-}{\text{COM}}$  Selects had two or more 67-9

- 21 Selects had 3 COM
- 5 Selects had 4 COM
- ¿2 Selects had 5 or more

#### **Operational Support**

(Avg. 3.7 per file) (Selected 158

 $_{COM}^{-78\%}$  Selects had at least one 67-9

 $\frac{-44\%}{COM}$  Selects had two or more 67-9

- 18 Selects had 3 COM
- 4 Selects had 4 COM

#### **Information Operations**

w/67-9) (Avg. 4.2 per file) (Selected 93

 $\frac{-84\%}{COM}$  Selects had at least one 67-9

 $\frac{-58\%}{COM}$  Selects had two or more 67-9

- 16 Selects had 3 COM
- 10 Selects had 4 COM
- 4 Selects had 5 COM

## COL, Army Board

## Recessed 45 Aug 02

2d Board under OPMS

#### **Operations**

w/ 67-9) (Avg. 5.2 per file) (Selected 317

- 73% Selects had at least one COM
- 35% Selects had two or more COM
  - 33 Selects had 3 COM
  - 11 Selects had 4 or more COM

#### **Institutional Support**

(Avg. 4.8 per file) (Selected 47 w/ 67-9)

- 77% Selects had at least one COM
- 47% Selects had two or more COM
  - 22 Selects had 1 or 2 COM
  - 14 Selects had 3 or more COM

#### **Operational Support**

/ 67-9) (Avg. 5.1 per file) (Selected 59

- 83% Selects had at least one COM
- 42% Selects had two or more COM
  - 40 Selects had 1 or 2 COM
  - 9 Selects had at least 3 COM

#### **Information Operations**

w/ 67-9) (Avg. 4.6 per file) (Selected 27

- 89% Selects had at least one COM
- 44% Selects had two or more COM
  - 12 Selects had 1 or 2 COM
  - 12 Selects had 3 or more COM

15

### COL BDE CMD (FY 03) Board

#### Felet rate a found

- COL CA BDE CMD
  - 206 Selected Primary & Alternate List with 67-9 reports
    - 68% had at least one 67-9 COM
    - BN CDR 41% had at least one 67-9 COM
    - 31% had two or more 67-9 COM
    - 12 had 3 COM
    - 5 had 4 COM
    - 1 had 7 COM
- COL CSA BDE CMD
  - 110 Selected Primary & Alternate List with 67-9 reports
    - 73% had at least one 67-9 COM
    - BN CDR 49% had at least 1 67-9 COM
    - 25% had two or more 67-9 COM
    - 5 had 3 COM
    - 2 had 4 COM
- COL CSS BDE CMD
  - 143 Selected Primary & Alternate List with 67-9 reports
    - 76% had at least one 67-9 COM
    - BN CDR 56% had at least one 67-9 COM
    - 41% had two or more 67-9 COM
    - 13 had 3 COM
    - 7 had 4 COM
    - 3 had 5 COM

#### 55C FY U3

## **Board SSC Select Rate -**

Considered Population was 4553 Officers:

- 75% (3393) had a mixed of ACOM & COM 67-9 reports
- 15% (688) had pure ACOM 67-9 reports
- 10% (472) had pure COM 67-9 reports

Bn Cmd Sel Rate -18% COL Sel Rate - 55.9%

Bde Cmd Sel Rate -21%

#### Operations (OPs) - 303 Principals/Deferred were > Of the 303 selected, 301 were Battalion selected:

- 66% (197) had a mixed of ACOM & COM 67-9 reports
- 33% (101) had pure ACOM 67-9 reports
- 1% (1) had pure COM 67-9 reports

#### **Commanders:**

- 260 Bn Cdr
- 30 TRADOC
- 7 USAREC
- 4 Garrison Cdr
- 2 CM & AV

#### Of 301 Bn Cdr, 253 had at least one BN Cdr Report:

- 66% (166) had pure ACOM 67-9 reports
- 27% (69) had a mixed of ACOM & COM 67-9 reports
- 7% (18) had pure COM 67-9 reports

#### **Operations - 716 Alternates were selected:**

- 71% (503) had a mixed of ACOM & COM 67-9 reports
- 25% (179) had pure ACOM 67-9 reports
- 4% (23) had pure COM 67-9 reports

#### 55C FY U3

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Bn Cmd Sel Rate - 18%

COL Sel Rate - 55.9%

Bde Cmd Sel Rate - 21%

#### <u>Operational Support (OS) - 49 Principals/Deferred</u> <u>were selected</u>:

- 44% (21) had a mixed of ACOM & COM 67-9 reports
- 54% (26) had pure ACOM 67-9 reports
- 2% (1) had pure COM 67-9 reports

#### <u>Information Operation (IO) - 26</u> Principals/Deferred were selected:

- 69% (18) had a mixed of ACOM & COM 67-9 reports
- 31% (8) had pure ACOM 67-9 reports

#### <u>Operational Support (OS)- 131 Alternates</u> were selected:

- 83% (108) had a mixed of ACOM & COM 67-9 reports
- 17% (22) had pure ACOM 67-9 reports

#### <u>Information Operation (IO)- 66 Alternates</u> <u>were selected</u>:

- 85% (56) had a mixed of ACOM & COM 67-9 reports
- 15% (10) had pure ACOM 67-9 reports

### <u>Institutional Support (IS)- 34 Principals/Deferred</u> <u>Institutional Support (IS)- 87 Alternates were were selected</u>:

- 76% (26) had a mixed of ACOM & COM 67-9 reports
- 24% (8) had pure ACOM 67-9 reports

- 94% (79) had a mixed of ACOM & COM 67-9 reports
- 6% (8) had pure ACOM 67-9 reports

### **Rater Tips**

# Rater has primary responsibility for counseling / mentoring. Pass Support Form 2 levels down

- Require subordinates' Support Forms in return
- Set aside time to Coach/Counsel ... Do it Early!
- **Enforce JODSF** -- Are there tasks/Is there counseling?
- Learn/understand OPMS 3 -- DA 600-3
- Narrative focuses on specific performance -- What an officer did and how well!
- Emphasize potential for the near term (3-5 years, command, assignment, school and promotion)
- Advocate your best to senior rater -- Remember senior rater is limited to the number of ACOM

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- -1. Be careful with "P" indicator
- 2. RO signs last, *Allow for Time*

SR uses AKO address when possible.

- 3. Scope & degree of responsibility in terms of: resources, people, facilities & budget.
- 4. <u>No</u> is Bad Leader Word Picture -

No, "School Solution"

Important to CFD Board

# DA FORM 67-9 (REVERSE

_				
-	NAME	SSN PART V - PERFORMANCE AND POT	PERIOD COVERED	
⇃	a. EVALUATE THE RATED OFFICER'S PERFORMANCE DURING			
	OUTSTANDING PERFORMANCE, MUST PROMOTE	SATISFACTORY PERFOR PROMOTE	MANCE, UNSATISFACTORY PERFORMANC DO NOT PROMOTE	E, OTHER (Explain)
	D. COMPENT ON SPECIFIC ASPECTS OF THE PERFORMANCE		III, DAFORM 67-9 AND PART IVA, b, AND c DA FORM 67-9-1.	
	C. IDENTIFY ANY UN QUE PROFESSIONAL SKILLS OR AREAS O CAREER FIELD FOR FUTUR E SERVICE	F EXPERTISE OF VALUE TO THE ARMY THAT THIS OFF	ICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH	LTC, ALSO INDICATE A POTENTIAL
		<b>.</b>		
ŀ		DADT VA BUTED	MEDIATE RATER	
-	a. EVALUATE THE RATED OFFICERS. PROMOTION POTENTIA		ENIOR RATER	officer(s) in this grade
	BEST QUALIFIED FULLY QUA	ALIFIED DO NOT PROMOTE	OTHER (Explain below)  OTHER (Explain below)  A completed DAForm679-1 in my evaluation and review	officer(s) in this grade was received with this report and considered YES NO (Explain in
	b. POTENTIAL COMPARED WITH OFFICERS SENOR RATED IN SAME GRADE (OVERPRINTED BY DA)	c. COMMENT ON PERFORMANCE / POTENTIAL		
	ABOVE CENTER OF MASS (Less than 50% intop box; Center of Mass if 50% or more in top box)			
	CENTER OF MASS			
	BELOW CENTER OF MASS RETAIN  BELOW CENTER OF MASS DO NOT RETAIN			
	DONOI RETAIN	d. LIST: 3 FUTURE ASSIGNMENTS FOR WHICHTHS CAREER FIELD FOR FUTURE SERVICE.	OFFICER IS BEST OF ARMY COMPETITIVE CATEGORY CPT TH	Rough Lic, also indicate a potential

6. To Date Most RO's viewed as *Outstanding* 

7. Performance & Potential

Authorized: Double space between Performance & Potential comments

(MSG 02-220)

8. **NOT for Potential -** Unique Skills, etc.

Optional: <u>Unique Professional</u>

<u>Skills / Expertise</u>

Mandatory: For ACC CPT thru LTC - must recommend a Career Field

(CF/BR or CF/FA)

9. **Potential Comments in narrative (VIIc), Three Future** 2.1

# Common OER Processing Errors

- Part II Invalid Rater/Senior Rater
- Part II Referred OER not referred
- Part IV.b Block checks missing
- Part IV.d HT/WT Yes/No missing
- Part V.b No potential comments (mandatory)
- Part V.c Raters consistently put potential comments
   No recommended Career Field
- Part VII.d. No recommended Career Field



# **Senior Rater Tips**

- Watch JODSF, approve tasks/monitor: Is there counseling?
- <u>Pass</u> Support Form 2 levels down; lead by example.
- Require Support Forms from subordinates.
- Guide the rater if necessary.
- Focus on potential (3 to 5 years; command, assignment, schooling and promotion).
- Develop/consider discussing your OER philosophy with your officers.
- Counsel; performance, growth (OPMS), leader development responsibilities.
- Remember rated officer signs the report last; be prepared to explain/justify your rating.

# **Senior Rater Tips**

- Know your population, e.g. How they perform, When they go before boards, When reports will be due......
- Look Ahead, Establish a Plan, Develop rating philosophy based on
  - "Center of Mass" norm -- Goal is 1/3 in Top Box, ensure Top Box is always less than 1/2.
- Review rating chains; who you rate/senior rate, do not pool officer populations.
- Consider Start-up Costs (1st 4 reports in each grade, only 1 ACOM).
- <u>Cannot</u> hold OERs past 90 days -- time used to manage your profile.
- Remember -- lieutenants are profiled separately (SR will have one profile for 2LTs & another for 1LTs).
- Depart TDY OER TDY/TCS/SD for 90 or more days under different rater

# Senior Rater "Rating Philosophy"

- Mission: Identify your best.
- Develop "Rating Philosophy" and consider communicating it to rated officers.
- Decide how to give ACOM's based on performance and potential (not position).
  - Give at least one to officers you believe to be a must select for promotion/command/school.

#### ind/or

Maximize ACOM's on only the very best in your population.

- Plan ahead, think series of reports (number of times you will senior rate an officer);
   use ACOMs sparingly.
  - Trends occurring:
    - ~ Many are giving COM's to most rated officers' on first rating followed by ACOM if deserved (exception: 1st OER on one of the best going before a board).
    - $\sim$  Most appear to be aiming at 1/3 ACOMs + or depending on population (remember, leave a cushion for unexpected rating situations).

# What's a Misfire?

Definition: An OER with an ACOM box check that receives a COM DA Label because the senior rater profile (50% or greater) does not support an ACOM rating.

- Mechanism to prevent Senior Rater Contact Program. Once OERs are processed, a daily Potential Misfire roster IDs problems. The SR is contacted and given options:
  - Submit COM OER(s) to support ACOM / and resequencing.
  - Withdraw / return potential misfire OER.
  - Give authorization to change box check to COM (SR should notify rated officer).
  - Officially misfire the report What happens?
    - Rated officer receives a COM DA Label.
    - ACOM counts on senior rater profile, further limiting SR ability

to give future ACOMs.

- SR receives a Discipline MEMO thru their rating chain.
- Bottom line:

# Important Rules

- Silver bullet -- First, single Top Box, at a given grade will generate ACOM label at DA, regardless of profile
- Can't mention box check in the narrative

# Senior Rater's Portion Part IV

PART VII - SENIOR RATER					
a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE SECOND STATE OF THE SECOND	i currently senior rate 10 officer(s) in this g				
HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED	CPT Buck is one of the best Captains I senior rate. I				
CENTER OF MASS	personally selected him from a group of carefully screened candidates to command an elite OPFOR rifle company. A				
RO: CPT BUCK, GEORGE 999999999999999999999999999999999999	consummate officer, CPT Buck leads by example, is soundly grounded on tactics and shares his soldiers' sacrifices and challenges. Must select this combined arms warrior for Major and early attendance to CGSC.				
RATINGS THIS OFFICER: 1	a. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.  Battalion S-3, Battalion Executive Officer, Brigade S-3; Would serve Army best in OPCF/11				

# Rating Level Consistency

#### **Recommendations:**

- Senior raters need to amplify their Potential box checks by using the narrative to clearly send the appropriate message to selection boards. The following classification of types of narratives may serve as a guide and assist in sending a clear message:
- **Exclusive narratives**. Those which clearly describe superior performance/potential above that of the vast majority, associated with early promotion and are restrictive in nature (e.g. top 1%, 3%, 5%, etc. of all officers, the best among a select grade or group, promote below the zone). Should only be utilized for the best ACOM reports within a mature profile, or on COM reports that follow an ACOM for same rated officer and at times for the very best officers with COM reports in small population/immature profile situations.
- Strong narratives. Those which describe significant performance accomplishments and enthusiastically recommend promotion, assignment to key duty positions fink (Pidupwis Connect with Box Check (exceptions: small profiles, be mobility and appropriate military schooling (e.g. among the best, easily in the Box thankful with your Narrative" the officer corps, definitely promote this officer, below the zone potential,

# Selection Boards Grade Senior Raters

"If you do something careless or unethical, your reputation leaves the board room with Board Members."

e.g - Exorbitant Claims

- Same Narrative, Different Officers
- Same Narrative, Back to Back, Same Officer
- "Cute" Phraseology

#### **Example Comments:**

"The Army has not begun to tap the talents of a true 5+ off

# **Senior Rater Tips**

Be careful with your narrative!

#### **Don't Exaggerate**

- "A future GO", "will be the best BDE CDR" (LT)
- "One of the bright young officers upon who's shoulders the future of Army Avia
- "In fact, skip CPT and promote to MAJOR." (LT)
- "If I could prove it \_\_\_\_\_\_ is a LTC disguised as a LT."
  "Always promote and school early."

#### **Don't Be Frivol**

Don't say:

"Eats taskings like candy."

- "WIZARD of the GREAT NORTH."
- "Gleam in his eye, fire in his belly."
- "One of the top four studs in the BN."
- "Midas touch of gold."
- "This one officer justifies every dollar spent on reconstructions"

#### **Concur with** rater,

#### **Don't Be Stupid**

- Job description on 3 month OER "Military liaison for Santa's Workshop."
- Check spelling ("top knotch, Ttrainer, wirter, Lieuteriants, assigne").
- "He is ready to lead a platoon, promote to CPT."
- "Concur w/rater." "The rater has said it all."
- "Top 1% of all LTs in the Army (marked Center of Mass) (large profile)
- "This LT is one of the top 2 I rate in the Bn." (rates 2)
- "Clearly in the top 5% of the LTs I rate." (small population)

### **Selection Board Instructions On:**

Small Population (1) Check Box in VIIa - same grade in population (3 OR LESS Small Population mature Profile)

(2) Check DA label: "Total Ratings"&"Ratings this Officer"

(5 or less = Immature Profile)

(3) Focus on "Narrative"- VIIc

	•			
PART VII - SENIOR RATER				
a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE				
X BEST QUALIFIED FULLY QU				
HODA COMPARISON OF	c. NARRATIVE COMMENTS ON PERFORMANCE / POTENTIAL			
THE SENIOR RATER'S PROFILE AND BOX CHECK	CW3 Buck is the most outstanding warrant officer I have			
AT THE TIME THIS REPORT	ever served with. He has earned the respect and trust of			
CENTED OF	every commander in the brigade. Particularly noteworthy			
CENTER OF MASS	was his contribution to the warfighting ability of the			
RO: CW3 BUCK, GEORGE	battalion and brigade by keeping the M2 Bradley Fighting			
99999999	Vehicles operationally ready. His fellow technicians			
	acknowledge him as the best technician in the division.			
SR: LTC SMITH 666666666	He is a soldier and leader first, and maintains those skills			
DATE: 98 07 18	at a level that equals his technical acumen. CW3 Buck			
DATE. SOUTE	d. LIST has the mability of the meet any challenge care or or note below the			
TOTAL RATINGS: 1	zone to CW4. A future CW5. DIV Maintenance Officer, TRADOC Instructor, CASCOM			
	DIV Maintenance Officer, TRADOC Instructor, CASCOM			
RATINGS THIS OFFICER: 1	Doctrine writer			

#### **Selection Board Instructions on:**

Label Never Shows Down-Turn in

		PART VII PORTER TO TOTAL A TO CO	-
	a. EVALUATE THE RATED OFFICER'S PROMOTION PO	TENTIAL TO THE NEXT HIGHER GRADE   Currently Senior rate   Officer(s) in this gra	de
	X BEST QUALIFIED FULLY QUA	ALIFIED DO NOT PROMOTE OTHER (Explain below) A completed DA Form 67-9-1 was received with this report and con in my evaluation and reviee X	sidered
		c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL	Small Population
	HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT	CW3 Buck is the most outstanding warrant officer I have ever	Small Population
	THE TIME THIS REPORT PROCESSED	served with. He has earned the respect and trust of every	
	400//- 65//	commander in the brigade. Particularly noteworthy was his	<b>(xample - 1 of 1</b> )
	ABOVE CENTER OF	contribution to the warfighting ability of the battalion and	
٧Į	A55	brigade by keeping the M2 Bradley Fighting Vehicles	$\langle A \rangle$
	RO: CW3 BUCK, GEORGE 999999999	operationally ready. His fellow technicians acknowledge him as	( <b>e.g.</b> Alde/
	SR: LTC SMITH 666666666	the best technician in the division. He is a soldier and leader	e.g. Aide/ Maintenance
	DATE: 98 07 18	first, and maintains those skills at a level that equals his	
	TOTAL RATINGS: 1	technical acumen. CW3 Buck has the ability to meet any	Warrant
	RATINGS THIS OFFICER: 1	Challenge. Promote below the zone to CW4.	waildhi
		DIV Maintenance Officer, TRADOC Instructor, CASCOM	
		Doctrine writer	•

	PART VII - SENIOR RATER	
a. EVALUATE THE RATED OFFICER'S PROMOTION PO	i currently senior rate 1 officer(s) in this gr	ade
X BEST QUALIFIED FULLY QL	JALIFIED DO NOT PROMOTE OTHER (Explain below) A completed DA Form 67-9-1 was received with this report and con in my evaluation and revie	sidered
	c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL	
HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT	CW3 Buck is the most outstanding warrant officer I have ever	
THE TIME THIS REPORT PROCESSED	served with. He has earned the respect and trust of every	C Event Driven
GENITED OF 144.66	commander in the brigade. Particularly noteworthy was his	
CENTER OF MASS	contribution to the warfighting ability of the battalion and	( ( Example - ) )
	brigade by keeping the M2 Bradley Fighting Vehicles	
RO: CW3 BUCK, GEORGE 999999999	operationally ready. His fellow technicians acknowledge him as	<b>Board/Numbers</b>
SR: LTC SMITH 666666666	the best technician in the division. He is a soldier and leader	Dogra/Namber
DATE: 98 07 18	first, and maintains those skills at a level that equals his	Problem
TOTAL RATINGS: 2	technical acumen. CW3 Buck has the ability to meet any	Lionian
RATINGS THIS OFFICER: 2	denial region. Promote below the zone to CW4. A future CW5.	
	DIV Maintenance Officer TRADOC Instructor CASCOM	

IIco

Doctrine writer

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#### **Selection Board Instructions on:**

Label Never Shows Down-Turn in

		PART VII SNIGR RATES
	a. EVALUATE THE RATED OFFICER'S PROMOTION PO	i che y en te la company de la
		c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL
	HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED	LTC Deer's performance continues to be outstanding. Absolutely the right person for a tough, demanding and diverse job. He
ı		
	ABOVE CENTER OF	excels everyday. I have given him a full plate throughout his command and he always delivers in an outstanding fashion. I
IYI	A55	know I can depend on him. LTC Deer has set the standard, from
	RO: LTC DEER, GEORGE 999999999	training to material management, and he has dramatically
	SR: MG JONES 66666663	improved the Division warfighting capability. LTC Deer is a rare
	DATE: 98 07 18	talent; use it to the Army's benefit. Promote him to Colonel now,
	TOTAL RATINGS: 20	send him to Senior Service College and give him a brigade to
	RATINGS THIS OFFICER: 2	dust returns a standard Appendix of the community of the
ı		· Division G 4, would serve Army best in Of C1/32

PART VII - SENIOR RATER						
a. EVALUATE THE RATED OFFICER'S PROMOTION PO	redirently senior rate 38 officer(s) in this grade					
HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED	Outstanding performance by a talented, caring leader, and masterful multi-functional logistician. Unlimited potential to serve					
CENTER OF MASS	at the highest levels within our Army. I could not have asked for a more capable and knowledgeable MSB Commander during our					
RO: LTC DEER, GEORGE 9999999999 SR: MG SMITH 666666666 DATE: 98 07 18 TOTAL RATINGS: 9	highly successful Division Warfighter. Under LTC Deer's solid leadership and very evident values based command environment, the battalion has excelled and soldiers are highly motivated, trained, disciplined, and mission focused. A total team player who knows how to balance mission accomplishment with true care for					
RATINGS THIS OFFICER: 1	soldiers and families: He is a must select for SSC, promotion to CHEGOM GAMPAGOM COMPASUPPORT Group Commander, Division G-4; Would serve Army best in OPCF/92					



# **Senior Rater Tips**

#### **Consider:**

- Use Senior Rater Option upon departure to complet
- Use Complete the Record Report to communicate to
- Pass your plan on to your replacement for considera and/or

Learn what ratings were rendered prior to your





# **Senior Rater Tips**

- Maintain a credible profile; Be careful don't Misfire
- Maintain a rating "<u>cushion</u>" Goal is 1/3 in top box (provides for surprise departures/performance changes).
- Ensure all reports arrive in desired sequence (ensure top box is always less than 50%). <u>Know Batch Processing</u>
- Get Board reports to HQDA by the "receive NLT" date on board messages.

√ If in doubt, call PERSCOM, *especially* 

√when <u>using the top box</u>

√DSN 221-9660; Commercial (703) 325-9660

## Develop a Senior Rater Rating Plan

	#of OERs	Last OER/Type/Rating	Projected	Projected	Projected	OER to	Subsequent	Cohort	Next Board/Date	Projected
	previously	Codes:	ÓER	Туре	Rating	DA(90days)	-	YG		Departure/
	received in	Change of Rater - CR			How I		Will the officer		Next selection	Promotion
	current	Change of Duty - CD	Date of	Type of	would rate	Date report	receive more		board the officer	
	position	PCS - PCS	next OER	report (Use	this officer	needs to be	reports from		would be eligible for	
	(include	Annual - AN		Codes)	if I rated	at DA	you after		(Use chart profile	
	previous	Com the Record -CTR			everyone	(except board	the proj OER,		management board	
	SR's OERS)	-			today	reports need	if so how many		dates)	
		Relief for Cause - RFC			<50% in ACOM	to get to DA				
					(Adjust as	per board				
		ACOM/COM/BCOM			events dictate)	message)				
Aco 1/35 Inf	1	JUN 98/CR/COM	un-99	AN	СОМ	Sep-99	Yes (1)	1991	BZ Major- Mar-00	Dec-99
Cdr Bco 1/35 Inf	1	J un 98/CR/ACOM	Dec-98	PCS	ACOM	Mar-99	No	1991	BZ Major-Mar-00	Dec-98
Cdr Cco 1/35 Inf	0	l un 98/CR/COM	J un-99	AN	СОМ	Sep-99	Yes (1)	1992	BZ Major-Mar-01	J un-00
Cdr Dco 1/35 Inf	0	l un 98/CR/COM	May-99	CD	СОМ	Aug-99	No	1992	BZ Major-Mar-01	J un-99
Cdr HHC 1/35Inf	0	J un 98/CR/COM	J un-99	AN	ACOM	Sep-99	Yes (1)	1991	BZ Major-Mar-00	May-00
Cdr Cco 2/35 Inf	2	I uly 98/CD/COM					No	1991	BZ Major-Mar-00	Aug-98
Bde S-1	1	Aug 98/PCS/ACOM					No	1993	BZ Major-Mar-02	Aug-98
Bde CM Off	0	Sep 98/CR/COM	Sep-99	AN	СОМ	Dec-99	Yes (1)	1991	BZ Major-Mar-00	J un-00
Bde Asst S-3	1	Sep 98/CR/ACOM	Apr-99	PCS	ACOM	J ul-99	No	1992	BZ Major-Mar-01	Apr-99
Cdr Aco 2/35 Inf	0	Sep 98/AN/COM	J un-99	CD	СОМ	Sep-99	Yes (1)	1992	BZ Major-Mar-01	<u>J an-00</u>
		Example								
	Cdr Bco 1/35 Inf Cdr Cco 1/35 Inf Cdr Dco 1/35 Inf Cdr HHC 1/35Inf Cdr Cco 2/35 Inf Bde S-1 Bde CM Off Bde Asst S-3	Current position (include previous SR's OERS)   Aco 1/35 Inf	current position (include previous SR's OERS)  Aco 1/35 Inf  Cdr Bco 1/35 Inf  Cdr Cco 1/35 Inf  Cdr Dco 1/35 Inf  Cdr HHC 1/35Inf  Cdr Cco 2/35 Inf  Bde CM Off  Cdr Aco 2/35 Inf  Change of Duty - CD PCS - PCS Annual - AN Com the Record -CTR SR Option - SO Relief for Cause - RFC Ratings: ACOM/COM/BCOM  I UN 98/CR/COM Sep 98/CR/COM Sep 98/CR/COM Sep 98/CR/COM Sep 98/CR/COM Sep 98/CR/COM	Current position (include previous SR's OERS)	Current position (include previous SR's OERS)	current position (include previous SR's OERS)  Annual - AN Com the Record - CTR SR Option - SO Relief for Cause - RFC Ratings:  ACOM/COM/BCOM   Lun-99   AN COM   Lun-99   AN	Current position (include previous SR's OERS)  Relief for Cause - RFC Ratings: ACOM/COM/BCOM  Cdr Bco 1/35 Inf  Cdr Cco 1/35 Inf  Oliver Dco 1/35 Inf  Oliver Dco 1/35 Inf  Oliver Dco 1/35 Inf  Cdr Dco 1/35 Inf  Cdr Dco 1/35 Inf  Cdr Cco 2/35 Inf  Cdr Cco 2/35 Inf  Campe of Duty - CD PCS - PCS Acom I un-99  Cdr Cco 2/35 Inf  Change of Duty - CD PCS - PCS Acom I un-99  Cdr Cco 2/35 Inf  Com Sep-99  Cdr Cco 2/35 Inf  Change of Duty - CD PCS - PCS Acom I un-99  Cdr Cco 2/35 Inf  Com Sep-99  Cdr Cco 2/35 Inf  Change of Duty - CD PCS - PCS Acom I un-99  Cdr Cco 2/35 Inf  Com Sep-99  Cdr Cco 2/35 Inf  Com Sep-99	Current position (include previous SR's OERS)   Com the Record - CTR SR's OERS)   Com the Port of the proj OER, from the deveryone today control the proj OER, from the proj	Change of Duty - CD   PCS - PCS   Annual   Common   Annual   Common   PCS   PCS   Annual   Common   PCS   PCS   Annual   Common   PCS   PCS   Annual   Common   PCS   PCS	current position (include previous SR's OERS)  Aco I/35 Inf 1 IUN 98/CR/COM Iun-99 AN COM Sep-99 Yes (1) 1991 BZ Major-Mar-00 Cdr Cco 2/35 Inf 0 Iun 98/CR/COM Iun-99 AN ACOM Sep-99 Yes (1) 1991 BZ Major-Mar-00 Cdr Cco 2/35 Inf 2 Iun 98/CR/COM Iun-99 AN ACOM Sep-99 Yes (1) 1991 BZ Major-Mar-00 Bde Asst S-3 1 Sep 98/CR/ACOM Apr-99 PCS ACOM Iun-99 CD COM Sep-99 Yes (1) 1991 BZ Major-Mar-00 Rador-Mar-01 Sep-98/CR/ACOM Apr-99 PCS ACOM Iun-99 No 1992 BZ Major-Mar-00 Rador-Mar-01 Rador-Mar-01 Sep-98/CR/ACOM Apr-99 PCS ACOM Iun-99 No 1992 BZ Major-Mar-00 Rador-Mar-01 Rador-Mar-0

Note: Promotable Officers serving in positions authorized the promotable grade will be profiled at the promotable grade if listed as (P) in the grade block of the OER.

## Senior Rater Profile Report

#### DA FORM 67-9-2

	FOR II		OFFICER EVALU		NG SYSTEM					
A. NAME	FOR USE OF THIS FORM, SEE AR 623-105; PROPONENT A B. SSN					C. RANK D. DATE OF REPORT				
CURRENT OER PROFILE							PROFILE HISTORY			
	ACOM COM	сом	BCOM RETAIN	BCOM DO NOT RETAIN	Total Ratings	Total Ratings	1st Block COM	% Total 1st Block		
MG										
BG										
COL										
LTC										
MAJ										
СРТ										
1LT										
2LT										
CW5										
CW4										
CW3										
CW2	_									
WO1										

Available upon request anytime.

You have 3 separate Profiles: (1) Active; (2) USAR; (3) ARNG

Active duty profile: PERSCOM (703) 325-9660; DSN 221-9660 email: tapcmse@hoffman.army.mil

Reserve profile: AR-PERSCOM (314) 592-0679; DSN 892-0679 Available thru 2XCitizen

**Guard profile:** Guard Bureau (703) 607-9123; DSN 327-9123

# Senior Rater Bottom Line

- Understand "How the System Works"
- Make The Hard Calls
- Be Fair, Open and <u>Counsel</u>

# Promotion Board Feedback

#### **CPT Board Recessed 19 Nov 01**

(Avg. 2.3 per file) (Selected 3568<sup>01</sup> w/ 67-9)

- 88% Selects had at least one COM
- 52% Selects had two or more COM

#### **MAJ Board Recessed 15 May**

(Avg. 3.6 per file) (Selected 1629 w/

- 80%(1309) Selects had at least one COM
- BQ Position 54% Selects had at least one COM
- 52%(853) Selects had two or more COM
  - 283 Selects had 3 COM
  - 93 Selects had 4 COM
  - 10 Selects had 5 or more COM

### Senior Service College Selection Board Feedback

#### Recessed 26 Apr 01

#### 415 Selects/Deferred

989 Alternate Selects

- 70% Selected had at least one 67-9
   COM
- 98 Selects had two or more COM
  67-9 reports
  - 25 Selects had 3 COM 67-9 reports
  - 9 Selects had 4 COM 67-9 report
  - 1 Selects had 5 COM 67-9 report

- 72% Selected had at least one 67-9
   COM
- 232 Selects had two or more COM 67-9 reports
  - 104 Selects had 3 COM 67-9 reports
  - 22 Selects had 4 COM 67-9 report
  - 3 Selects had 5 COM 67-9 report

## LTC BN CMD (FY 03) Board

#### Feedback Select rate

- LTC CA BN CMD
  - 465 Selected Primary & Alternate List with 67-9 reports
    - 66% had at least one 67-9 COM
    - BQ position 25% had at least one 67-9 COM
    - 29% had two or more 67-9 COM
    - 22 had 3 COM
    - 3 had 4 COM
- LTC CSA BN CMD
  - 187 Selected Primary & Alternate List with 67-9 reports
    - 67% had at least one 67-9 COM
    - BQ position 31% had at least one 67-9 COM
    - 30% had two or more 67-9 COM
    - 13 had 3 COM
    - 4 had 4 COM
- LTC CSS BN CMD
  - 244 Selected Primary & Alternate List with 67-9 reports
    - 69% had at least one 67-9 COM
    - BQ position 33% had at least one 67-9 COM
    - 28% had two or more 67-9 COM
    - 28 had 3 COM
    - 8 had 4 COM
    - 1 had 5 COM



- Include potential comments (comments which address future) in both the rater and senior rater narratives. <u>Put them at the end of the narrative</u>.
- Make sure reports are signed by all parties (rater, intermediate rater, senior rater, and rated officer). Some reports have arrived at PERSCOM without signatures.
- Provide accurate social security numbers.
- When applicable, include unique skills.
- When rated officers have been selected for promotion, and are serving in an authorized position for the grade to which they are to be promoted, enter "P" next to their current grade (e.g. CPTP, LTCP, CW2P). These reports will be profiled against the promotable grade population.



- Don't evaluate potential in the Unique Skills box, part Vc.
- Don't add gimmicks to narratives (e.g. bolding, bullet comments, underlining, picture framing, etc.) Reports will be returned.



#### **Observation**

#### Duty Description: (Part IIIc.)

- Remains important for selection boards understanding position and scope of responsibilities.

#### Performance Evaluation: (Part IV)

- Healthy trend is developing; tendency to rate officer in a position as opposed to generally, e.g. many war fighters are not getting "tactical" in performance evaluation when on staff.

#### Unique Professional Skills: (Part Vc.) and Comments on Performance/Potential (Part VIId.)

- Raters and senior raters must provide recommended potential career field and branch or functional area recommendations for ACC CPTs through LTCs.
  - Unique Professional Skills remains optional.

#### Performance and Potential Evaluation (Part Va.)

- Vast majority of raters are checking the "Outstanding Performance Must Promote" box. Less than 3% are checking other boxes.

#### Rated Officer's Promotion Potential (Part VIIa.)

- There is no required link between the fully qualified box and a COM rating, in fact the vast majority of COM ratings are best qualified.

# • Potential comments in narrative (Part VIIb.), Future Assignments and Career Field in (Part VIId.) should be consistent

# SENIOR RATER'S PORTION -

PART VII - SENIOR RATER						
a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO  BEST QUALIFIED FULLY QU	i currently senior rate 10 officer(s) in this g					
HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED	personally selected him from a group of carefully screened					
ABOVE CENTER OF MAS	sandidates to command an elite OPFOR rifle company. A consummate officer with great command presence. CPT Buck					
RO: CPT BUCK, GEORGE 999999999999999999999999999999999999	pleads by example, is soundly grounded in tactics and shares his soldiers' sacrifices and challenges. Outstanding warrior leader, whose educational background and personal desires indicate he would best serve the Army as an Information					
RATINGS THIS OFFICER: 2	Systems Manager Must select BZ for Major and early attendance to CGSC. Division Automation Management Officer, Corps Staff AMO, Combat Service Support AMO; Would serve Army best in IOCF/53					
	1001/33					

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Battalion S-3, Division Automation Management Officer, Corps Staff AMO; Would serve Army best in IOCF/53

#### Selection Board

# Feedback Senior Rater Narrative

#### · Avoid Disconnect with Box check

(exception: small profiles, back to back reports)

- Example:

Rating: COM Rating: COM

Total ratings: 28 Total ratings: 14

Comments: Top 8% of all majors rated. 
Comments: My best commander.

# "Be careful with your Narrative"

#### OER BATCH PROCESSING

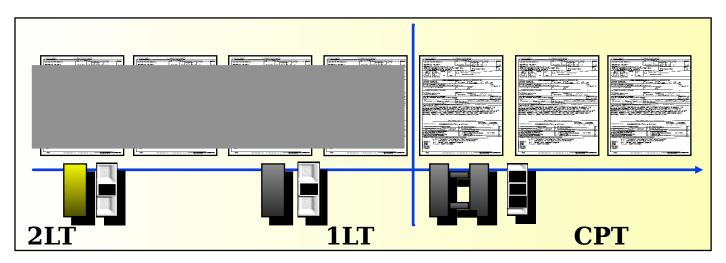
• Batch processing at
PERSCOM-Arrive on same day
From same senion
In same grade

Profile = 2 in top box; 4 in second box. ior rater is forwarding 2 top box reports to PERSCOM

Both arrive on the <u>same day</u>: Process on <u>separate d</u>

- Profile becomes 4 in top box; 4 in 2d Profile on 1st: 3 top box; 4 in so
  - Top box less than 50%-- ACOM
- Top box on both not less than 50%;
  - Profile on 2nd: 4 in top box; 4 i
- Both receive "COM" label Top box not less than 50%-- CO

# Masking Early OERS





#### **ISSUES:**

- Quality of junior officer assignment varies
- Intensity of junior officer experience varies
- Speed of integration into Army culture var

#### **POLICY**

- LT reports masked after promotion to CPT
- WO1 reports masked after selection

## **OPMS XXI Career Fields**

**Basic Branches** FA 48 Foreign Area Officer FA 39 PSYOP and Civil Affairs FA 51 Army Acquisition Corps Institutional Support (15) FA 24 Information Systems Engineering. Information Operations FA'45 Comptroller

**FA 30 Information Operations** FA 34 Strategic Intelligence

**Operations** 

**FA 40 Space Operations** 

FA 46 Public Affairs

FA 52 Nuclear Research and Operations
FA 57 Simulations Operations
FA 57 Simulations Operations
FA 57 Simulations Operations

FA 57 Simulations Operations

FA 47 Academy Professor, USMA

Operatiónal Support (OS)

FA 49 Operations Research/Systems A

FA 50 Force Management

Effective 1 JAN 99, OPMS XXI Career Field comments by Rater in part Vc & Senior Rater in Part VIId are mandatory for ACC CPT thru LTC on the OER. See MILPER MSG NR 98-194 for details.

Example: "Would serve Army best in CF/BR" or "Would serve Army best in CF/FA"

## Unique Professional Skills/Area of Ex

# Recent notable examples taken from Part Vc of the OER...

- Uniquely qualified in amphibious operations as a certified U.S. Navy fire support planner...
- Expert in strategic nuclear deterrence policy and operations...
- A thorough knowledge of Middle Eastern culture and political affairs...
- Possesses excellent computer skills and a demonstrated expertise in systems automation...
- Has vast experience and an avid interest in Unmanned Aerial Vehicle (UAV) technology; can serve as a key player in formulating future doctrine for these systems...

## **Cannot** Hold OERs Past 90 Days

Perception - Its **OK** to hold reports past suspense in order to sequence

- **No!** Over 1 Year into system, profiles should be established, Boards beginning to question.
- **90 days** to submit reports to DA -- Required by Regulation.
- Late Statistics Report by name (Senior Rater) to field, Beginning 1 April.

